

Santrax[®] Agency Management and Santrax[®] Payor Management 6.9.23

Release Date: Thursday, February 1, 2018 UNIVERSAL RELEASE NOTES

The content of the enclosed Release Notes is dependent upon final Quality Assurance validation. If you have any questions or concerns about the content therein, please contact Customer Care at your agency's designated telephone number. The final version will be available in your online library post-release.

Valued Provider:

We are now including all items in the release notes. They may or may not apply to your configuration. In reviewing the notes below, please refer to the "prerequisites" line which indicates the required functionality, product, or audience associated with the item.

If the functionality is not automatically available, please contact your Sales Representative or Customer Care for additional information.

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Jurisdictional View	
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STAFF

1. ALLOW IN-SERVICE COMPLIANCE CALCULATIONS TO RESET FOR REHIRED STAFF.

Changes have been made to accommodate employees who have been terminated and rehired. When a staff member is rehired, the staff member's in-service compliance period will recalculate. This new compliance date is reset based on the staff member's rehire date and allows the allotted time period before the employee must complete the compliance item. The staff member will remain compliant until the time period expires.

Prerequisite: None

2. MODIFIED STAFF ADVANCED SEARCH.

Modifications were made to ensure that when the **Reason** filter (**Secondary Status**) is selected, the results will reflect that selection.

Prerequisite: None

Staff Search						Refrest	h 🛃 Save 🗙	Close
Search Filters								
Attributes	Client:			~	Service:			¥
Company:	~	First Name:			Manager:	,		~
Location:	×	Last Name:			Position:	J		v
Agency:	×	Agency ID:		SSN:	-	🗹 Internal Staff	Ŧ	
Team:	~	County:		~	Language:			\sim
Statusi	02- Active V	ZIP		Proximity		Availability	Prev Worked	
Reason:		Region:		~	Date:	01/30/2018		
Coord:	A- Active C- In Class H- Rehire		Working in Zip/Regio	on Tolerance 60 minu	ites From:		To:	
	K- Casual V- Visit							

BILLING

3. MODIFIED BILLING EXPORT.

Modifications were made to ensure that complete reference numbers display in box 64 of the UB04 billing format.

Prerequisite: None

4. UPLOADING VNS REMITTANCE FILES.

The VNS remittance file can now be uploaded through the Electronic Remittance feature. **Prerequisite:** None

JURISDICTIONAL VIEW

5. NEW SOURCE INDICATOR ADDED TO JURISDICTIONAL LATE MISSED VISIT DETAIL REPORT.

Add a new column, **Source**, to the Jurisdictional **Late Missed Visit Report.** This field indicates the source of the reason for the late or missed visit. The field indicates three possible sources:

- M: Member
- A: Agency
- P: Payer

Prerequisite: Jurisdictional View User

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REPORTS

 6. REPORT MODIFICATIONS - SPEAKER VERIFICATION ENROLLMENT STATUS & STAFF LIST REPORTS. Modifications were made in the Staff List and Enrollment Status reports to ensure all employees missing speaker verification enrollment data are included regardless of the number of digits in their Santrax ID. Prerequisite: None

ADMIN

7. STAFF POSITION SCREEN MODIFICATIONS.

A new field, **Custom Code**, has been added to the **Staff Position** screen. This field is used to map a staff position to any third-party's system interface.

<u>Rules</u>:

- Field is not required
- Maximum length of 25 characters
- Will not support special characters
- Can support duplicate values across staff positions

Prerequisite: Third-Party Interface

General			
Code:	HSK		
Name:	HOUSE KEEPER		
Description:	HOUSE KEEPER		
Custom Code:			
	Disallow user accounts for this p	position	
Compliance	ervices Documents Require		53
Compliance S			
	ervices Documents Require	d Fields	
Name	ervices Documents Require	d Fields	
Name ADMINISTRATIV	ervices Documents Require	d Fields	

- 8. New COLUMN IN CALL TYPE INFORMATION REPORT. Add new columns to the report:
 - Admit Type
 - MCO Approval Reason
 - MCO Confirmation Reasons
 - Comments

Prerequisite: BCT

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